

# ServiceNow Knowledge Implementation



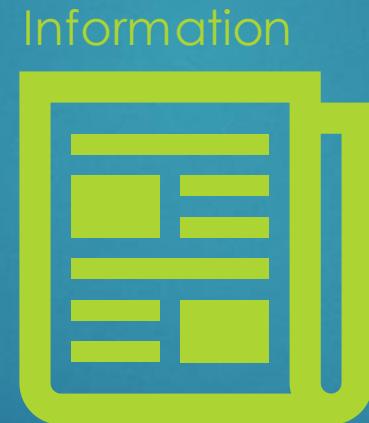
GLEN CHIASSON, JUNE 15<sup>TH</sup>, 2020



West Coast Workflow

# What Is Knowledge Management?

- ▶ Goals Of Knowledge Management
  - ▶ Gather
  - ▶ Analyze
  - ▶ Store
  - ▶ Share



# Why Use Knowledge Management?

- ▶ Self Service – The Key to Success
  - ▶ Reduce employee or customer help desk dependency
  - ▶ Less help desk calls reduces service costs
  - ▶ Employee productivity and customer satisfaction improvement by reducing resolution times
  - ▶ Promotes knowledge sharing



# Areas Of Focus

- ▶ Knowledge management supports and enhances key business systems and processes
  - ▶ Incident management
  - ▶ Problem management
  - ▶ Change management

# Continually Improve

- ▶ Identify knowledge gaps
- ▶ Add new and relevant content
- ▶ Track usage
- ▶ Governance and quality



# Implementation Preparation

- ▶ Designate a knowledge process owner who is the voice for the organization. The authoritative decision maker
- ▶ Willingness to critically examine current working practices
- ▶ Identify your knowledge base consumers
- ▶ Identify article writers, editors and managers



# Roles And Responsibilities - Manager

- ▶ Appoint a knowledge manager within your organization who is responsible for
  - ▶ Defining categories
  - ▶ Submitted article review for accuracy and standards
  - ▶ Identify new content to support the end users' needs
  - ▶ Encourage contribution
  - ▶ Create and maintain templates for consistency
  - ▶ Provide process metrics and reporting

# Roles And Responsibilities - Contributor and User

- ▶ Contributors and Users
  - ▶ Submit new articles
  - ▶ Update content
  - ▶ Use articles in daily activities
  - ▶ Identify articles that are out of date or require updates

# Knowledge User Roles

- ▶ knowledge\_manager
  - ▶ Can administer knowledge bases and request new knowledge bases for the knowledge\_admin to approve
- ▶ knowledge\_admin
  - ▶ Can manage the Knowledge Base
- ▶ Knowledge
  - ▶ Can write, edit, and review knowledge management articles

# Recommended Knowledge Plugin

- ▶ Knowledge Management Advanced
  - ▶ Not activated by default
  - ▶ Introduces article versioning and templates for article consistency

<https://docs.servicenow.com/bundle/newyork-servicenow-platform/page/product/knowledge-management/task/activate-knowledge-advanced-plugin.html>



# Knowledge Base Implementation Steps

- ▶ Knowledge Base
  - ▶ A repository where relevant and related articles are stored (IT for example)
  - ▶ A Knowledge Base will contain structured categories and sub-categories within (Incident, Change, Self Service for example)
  - ▶ Allow multiple KB's within the structure
  - ▶ Each KB should have its own separate workflow
  - ▶ KB should have unique categories with appropriate levels (use PDI or sketch for planning)
  - ▶ Consider various article views (end user, customer, help desk)
  - ▶ Create content / Import
  - ▶ Encourage feedback and article rating



# Guided Setup

**Welcome to Knowledge Management Guided Setup**

**4%**  
Complete

**Getting started**

Knowledge Management enables customers, employees, and agents to find information such as self-help, troubleshooting, and task resolution. Knowledge content is stored in knowledge bases. Knowledge bases contain knowledge articles, which users create to share ideas, experience, and information. Users can search for, review, and provide feedback on knowledge articles, resolving issues themselves rather than contacting customer service or an internal helpdesk.

Knowledge Management helps capture and share the ideas, experience, and information that your users collectively possess. Effective use of Knowledge Management improves efficiency, quality of service, and customer satisfaction.

**Continue**

**Get going**  
Get up and running with Knowledge Management quickly and easily

**Learn**  
Learn common configurations in Knowledge Management

**Be empowered**  
Feel empowered to make additional configuration changes at a later time

**Pre-Setup Guide**

Determine your knowledge requirements in advance to ease the setup process.

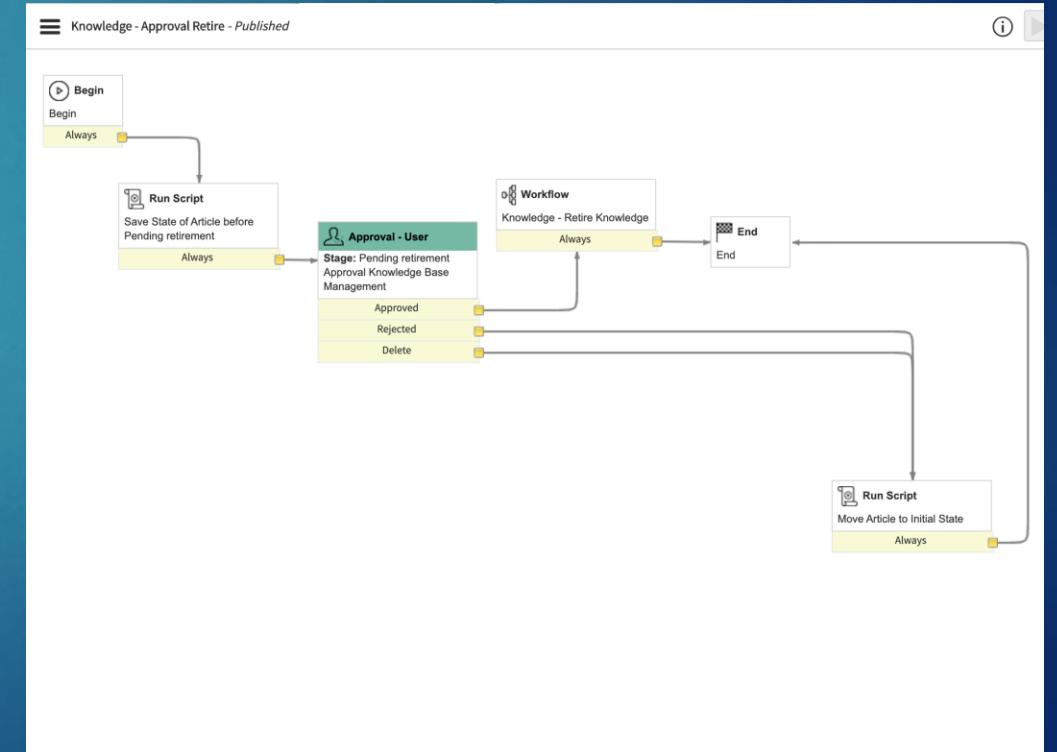
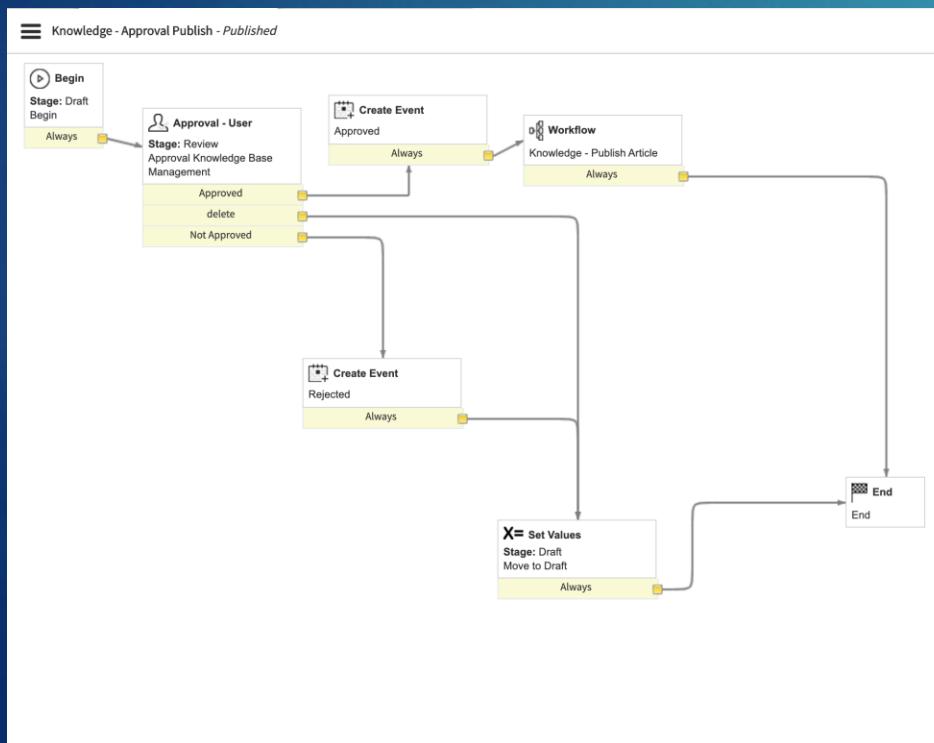
Knowledge base	Knowledge articles
Who are the consumers of knowledge base content?	Which article templates do you want to setup?
Which type of consumer should have access to which Knowledge Base?	Who should be responsible for authoring knowledge articles?
Which roles are required?	Which article categories are required?
Who are the admins, owners, and managers for the knowledge bases?	Do you want to create articles from a case or an incident?
What are the required workflows to publish and retire articles?	Do knowledge articles need to be translated into other languages?
What should or should not appear in the search results?	What should the default notifications that users receive be?
Are there any external sources that need to be integrated?	

- ▶ Knowledge has a guided setup which is a great starting point
- ▶ Walk through the setup process in your PDI



# Workflows

- ▶ OOB Approval publish and retire workflows can be copied and modified for multiple knowledge bases
- ▶ Recommend implementing a solution bringing attention to upcoming articles that will retire

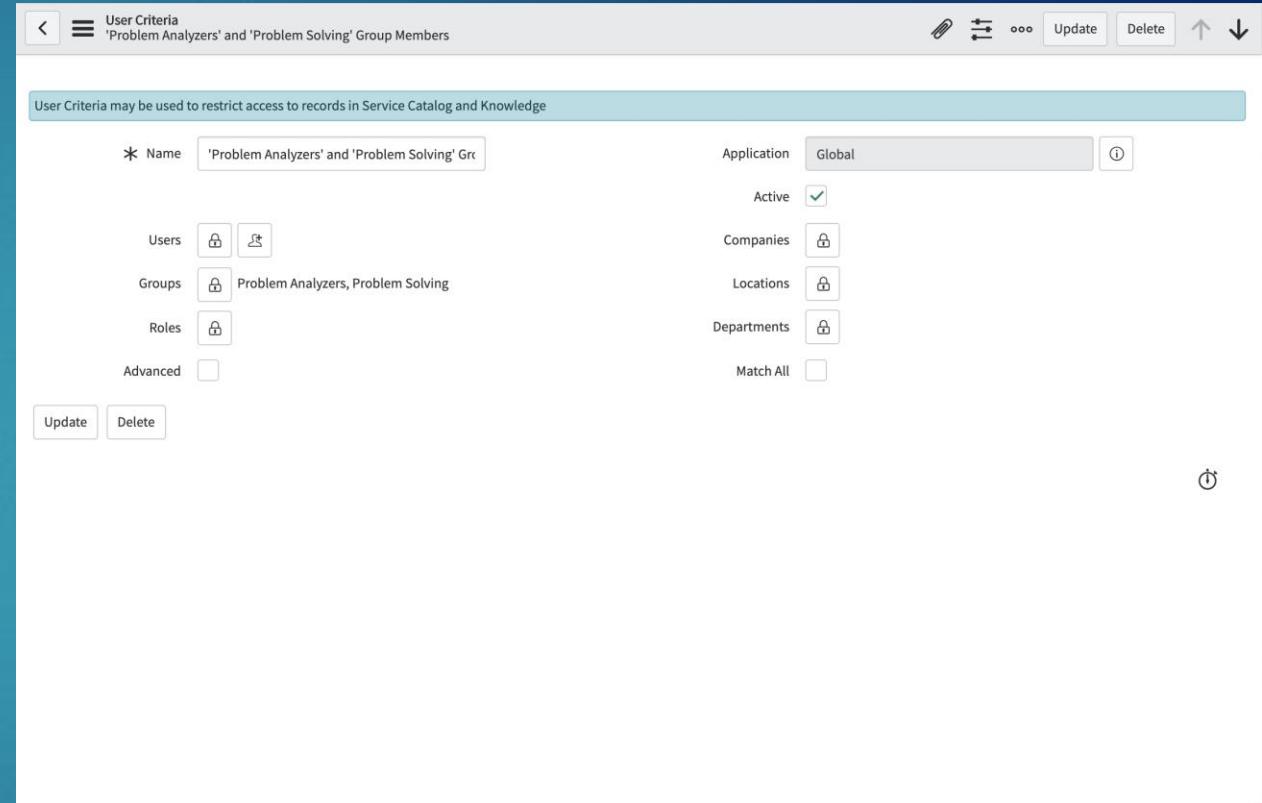


# Knowledge Article Lifecycle States

- ▶ DRAFT – Article is saved but does not appear in the KB for users until it's reviewed and published
- ▶ REVIEW – Article is available to the KB manager and owner
- ▶ PUBLISHED – Article is available to users who have permissions to view
- ▶ RETIRED – Article is removed from the KB and is no longer available for users to view

# Knowledge Base User Criteria

- ▶ Utilize user criteria for knowledge base access as opposed to ACLs. Managers can add and remove criteria but not create
- ▶ Criteria can be used at the knowledge base level as well as article level
- ▶ At this time, criteria cannot be utilized at the knowledge base category level. If this is required, I'd recommend placing those articles in a separate knowledge base



# Knowledge Blocks

The screenshot shows the 'Knowledge' application interface. On the left, a 'New record' form is displayed with fields for 'Knowledge base' (set to 'IT'), 'Category', 'Valid to' (set to '2100-01-01'), and a 'Short description' field containing the text 'This is a KB With Blocks'. Below this is the 'Article body' section, which includes a rich text editor toolbar and a preview area. The preview area displays the text 'KBB0010006 Test KB' and a single 'p' character. At the bottom of the form are buttons for 'Submit', 'Add Blocks', and 'Search for Duplicates'.

On the right, a modal window titled 'Add Blocks' is open. It features a search bar with 'ACME' typed into it, an 'Advanced Search' button, and a list of blocks. The first block listed is 'KBB0010006 Test KB'. It shows 'Can Read: All ACME North America employees' and 'Cannot Read:'. There are 'View' and 'Insert' buttons at the bottom of this block's card.

- ▶ Allows content within an article to be restricted by user criteria
- ▶ Driven by HR requirements can be helpful for organizations with internal and external customers where KA content differs
- ▶ Reduces KA management by eliminating the need for multiple articles of the same policies

# Create Articles From Incidents and Problem Records

- ▶ Knowledge field located on task forms such as incident, change, problem and case is an OOB field that can be used to automatically create articles
- ▶ Existing Business Rule named Incident Create Knowledge can be modified and reused on any table such as change

The screenshot shows the 'Incident' creation screen in ServiceNow. At the top, there are various configuration fields: Subcategory (dropdown), Service (text input with search icon), Configuration item (text input with search icon), Urgency (dropdown set to '2 - Medium'), Priority (dropdown set to '4 - Low'), Assignment group (text input with search icon), and Assigned to (text input with search icon). Below these are two text areas: 'Short description' containing 'Unable to access the shared folder.' and 'Description' containing 'Unable to access the shared folder. Please provide access.' A 'Related Search Results' button is located below the description area. At the bottom of the screen, there is a 'Resolution Information' tab selected, showing fields for 'Knowledge' (checkbox checked), 'Resolution code' (dropdown set to 'None'), and 'Resolution notes' (text area). Below this tab are buttons for 'Update', 'Resolve', and 'Delete'. A 'Related Links' section with a 'Repair SLAs' link is also visible. The bottom navigation bar includes tabs for 'Task SLAs', 'Affected Cls', 'Impacted Services/Clis', and 'Child Incidents'.

# Knowledge Article Meta

What Is  
KB0010009 v5.0

Number: KB0010009      Version: 5.0

Knowledge base: IT      Workflow: Published

Category: Announcements      Source Task:

Published: 2020-06-16      Attachment link:

Valid to: 2100-01-01      Display attachments:

Short description: ServiceNow Vancouver Developer Meetup

Introduction: ServiceNow Developer Meetups are for developers interested in building on the Now Platform®. The exact format of each event can vary -from hearing a presentation about the developer features in the latest release, grabbing drinks at a local bar or pub while talking shop, to working through a hands-on lab. The core principle is that each event is focused on ServiceNow developers and developer content.

Explanation: If you are a ServiceNow Developer, ServiceNow admin interested in development, developer on another platform or just want to learn about ServiceNow development, you should attend. Topics range from Studio, Source Control, Business Rules, Script Includes, Scripted REST APIs, Service Portal and more.

Meta: glen, developer, tree

Checkout   Retire   Delete

Related Links

[View Article](#)  
[Run User Criteria Diagnostics](#)

- ▶ Improve search results
- ▶ Focus on how a user would search
- ▶ Can mean the difference between a user creating a new article



# Content Import

- ▶ External source can be defined by activating the Knowledge Management External Content Integration plugin
- ▶ Import MS Word documents
- ▶ Import format may differ from the original

Import Articles

Import

\* Knowledge Base

IT X ▾

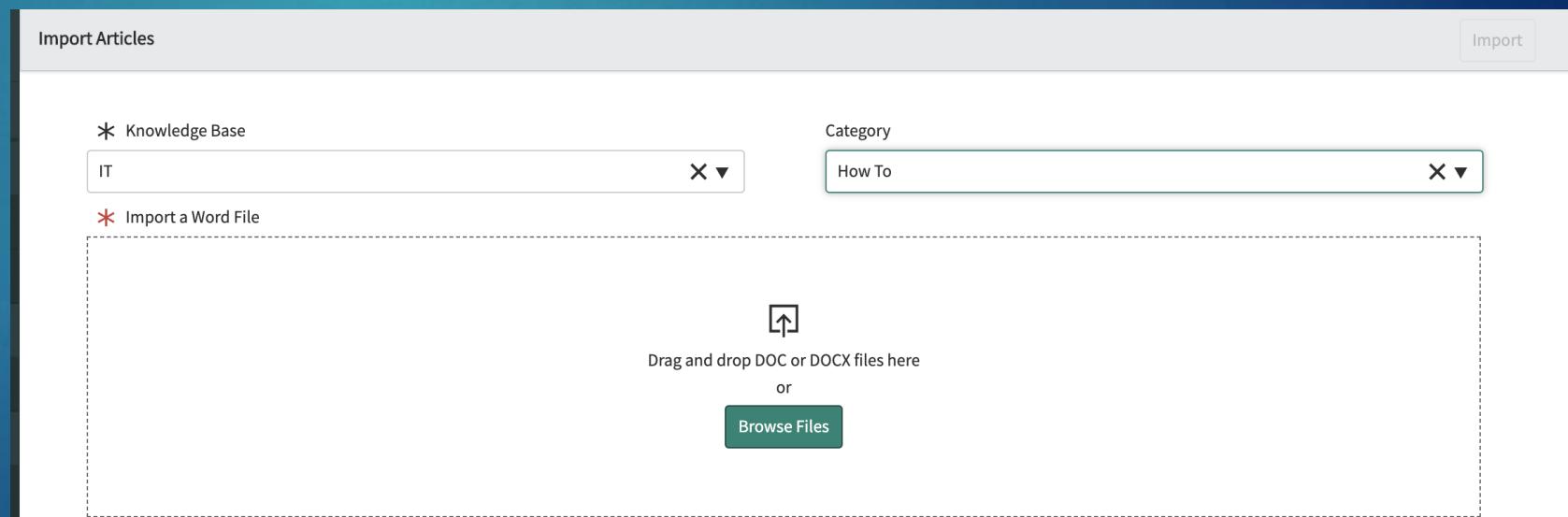
\* Category

How To X ▾

\* Import a Word File

Drag and drop DOC or DOCX files here  
or

Browse Files



# Article Templates

- ▶ Users are presented with a template selection at the time of article creation
- ▶ Templates can be customized with field additions, mandatory fields etc.
- ▶ Ensures consistent look and feel to the user base



Switch to updated version of this page (recommended)

Article Template Selector

Select the Article Template

Standard

FAQ

How To

KCS Article

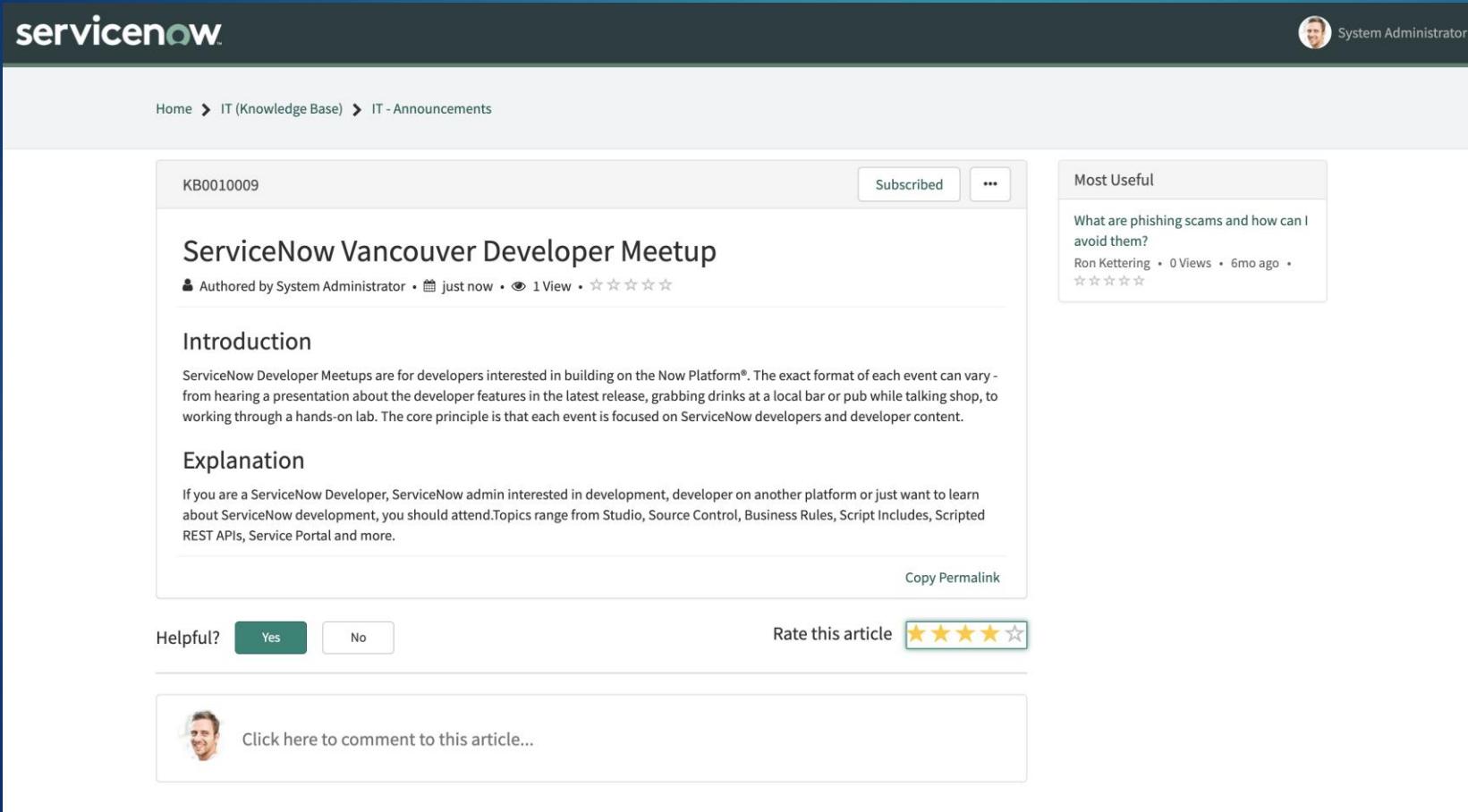
Vancouver SN Dev Meetup

What Is

⋮

Edit Interceptor

# Article Feedback



The screenshot shows a ServiceNow knowledge article page. The header includes the ServiceNow logo and a user profile for 'System Administrator'. The breadcrumb navigation shows 'Home > IT (Knowledge Base) > IT - Announcements'. The article title is 'ServiceNow Vancouver Developer Meetup' (KB0010009), authored by 'System Administrator' just now, with 1 view and a 5-star rating. The 'Introduction' section describes ServiceNow Developer Meetups as events for developers interested in the Now Platform, ranging from presentations to hands-on labs. The 'Explanation' section covers topics like Studio, Source Control, Business Rules, Script Includes, and REST APIs. At the bottom, there are buttons for 'Helpful?' (Yes/No), 'Rate this article' (5 stars), and a comment section with a placeholder 'Click here to comment to this article...'.

- ▶ Users can rate articles which will provide useful feedback
- ▶ Feedback for an article can be viewed within a related list on the knowledge article itself
- ▶ Knowledge managers should review feedback regularly to ensure accuracy and relevant content

# Thank You!

- ▶ Implementing Knowledge within ServiceNow can reduce both resolution times and calls to the help desk lowering operational costs

